

Growing Global Ethanol Use

Fuel ethanol policy and supply & demand in neighboring countries

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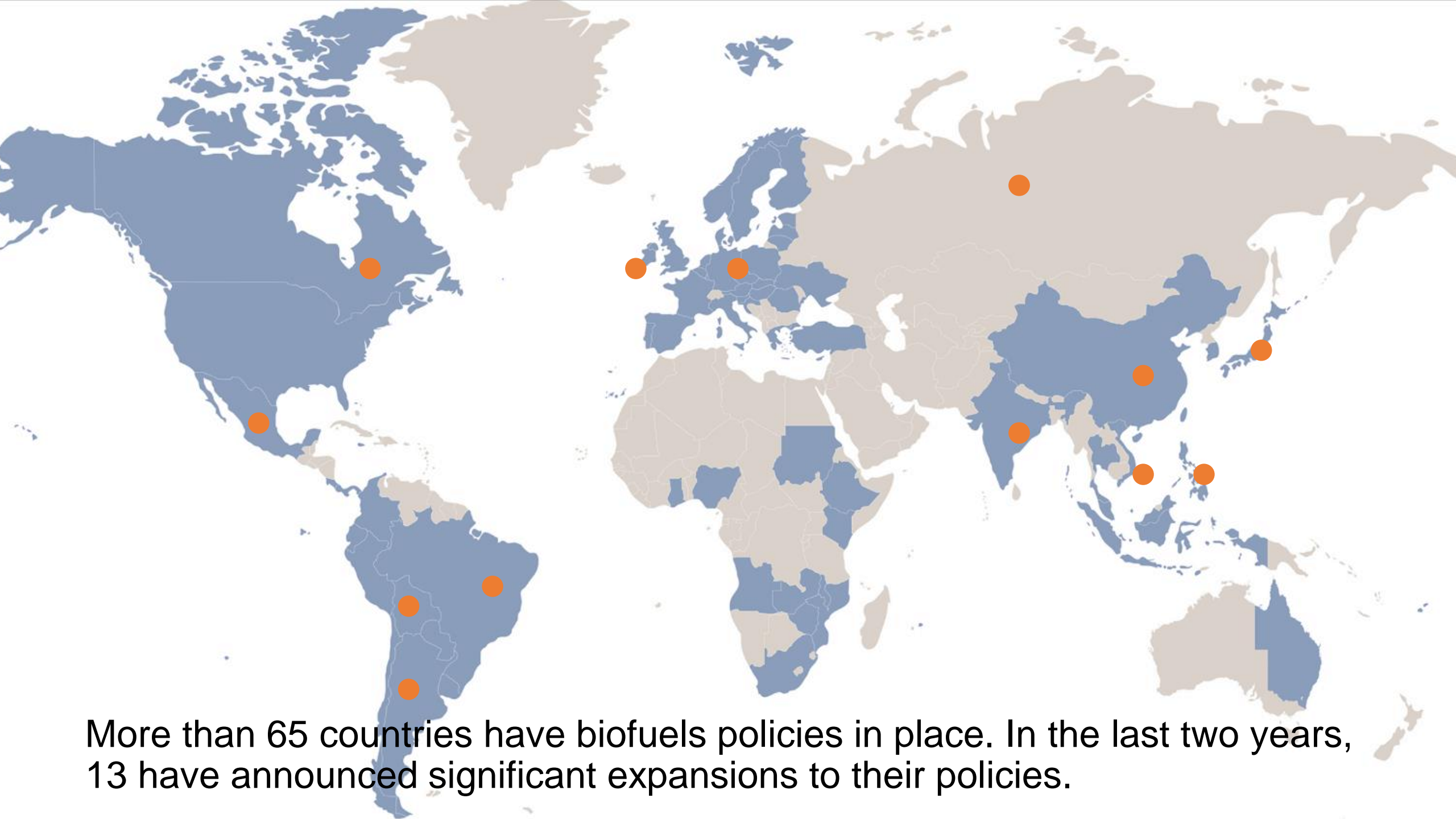
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Countries enforce ethanol/biofuels/renewable content policies for three primary reasons:

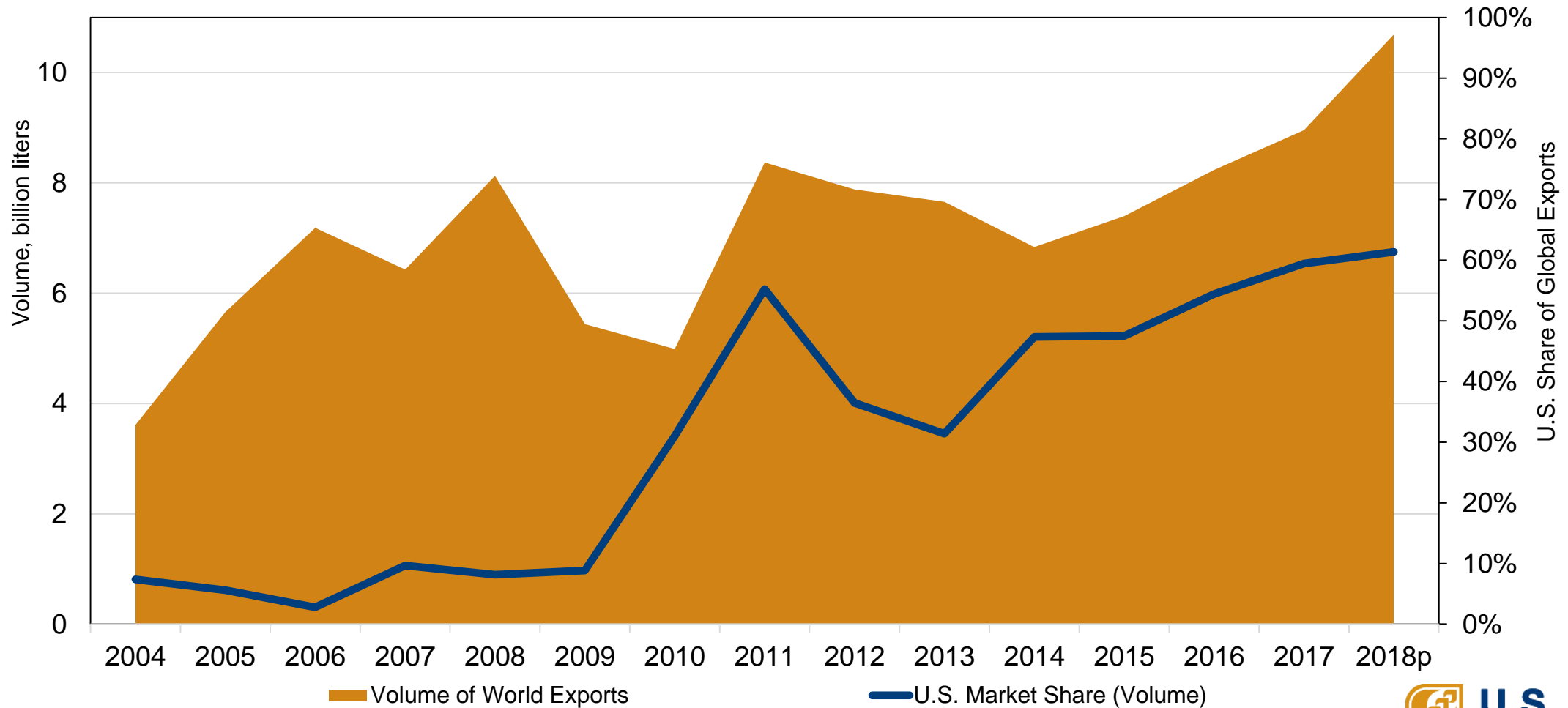
1. To achieve environmental goals
2. Human health benefits
3. Economics and profitability



More than 65 countries have biofuels policies in place. In the last two years, 13 have announced significant expansions to their policies.

2018 Global ethanol trade reaches record 10.7 billion liters

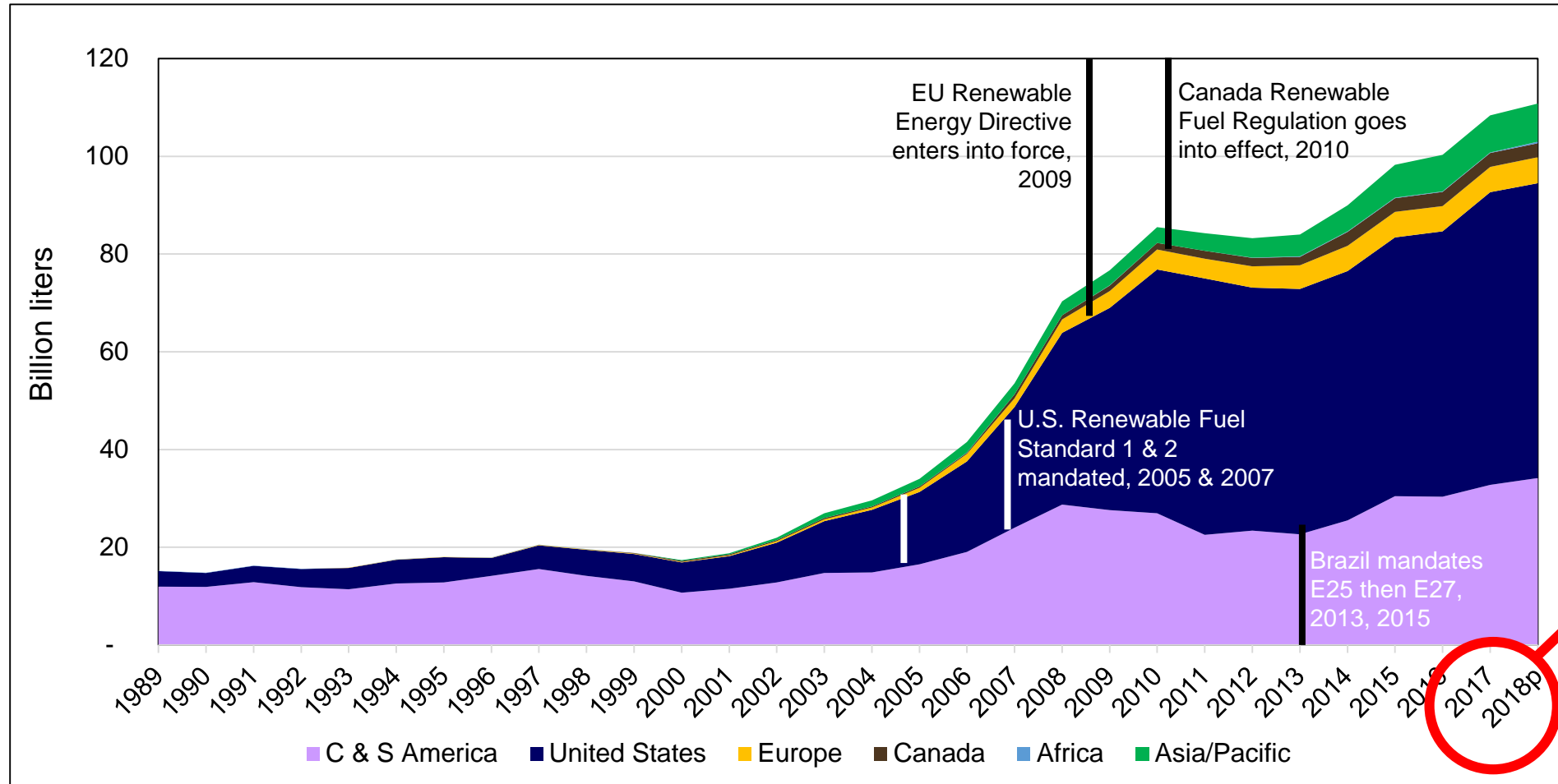
U.S. share of world exports expands to 61%



Source: Global Agricultural Trade System (UN Trade Data subset) and Global Trade Atlas, U.S. Grains Council – projections (p)

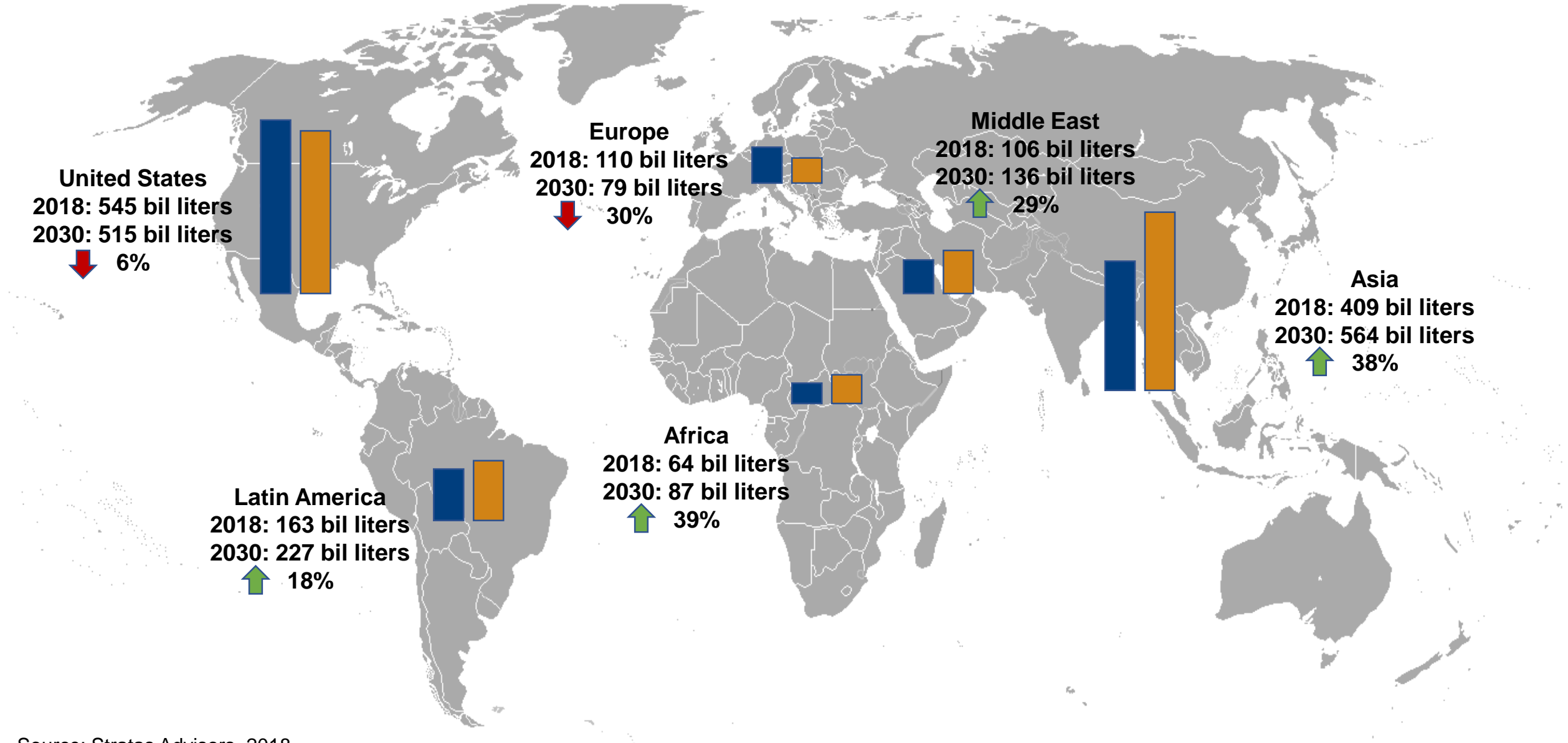
Global production has surpassed 110 billion liters, and is expanding

Policy drives expanded use of ethanol



New policy developments over the last two years are in response to countries trying to meet 2015 Greenhouse Gas reduction commitments, which will further drive ethanol production and trade

Increased gasoline demand signals strong biofuels potential in developing countries to offset increased emissions

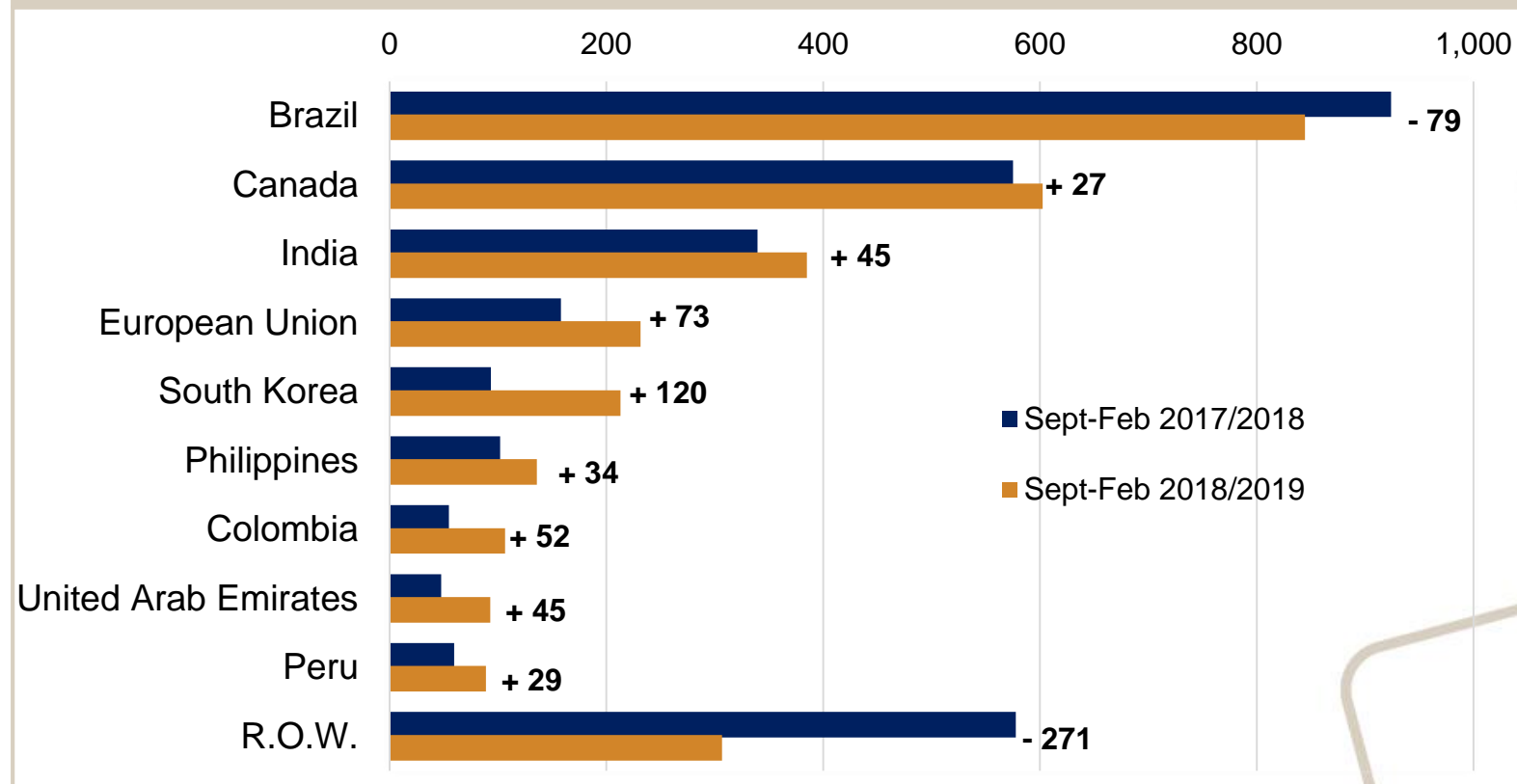


Outlook for use and trade

U.S. exports are coming off a record year, 6.1 billion liters in MY2017/18

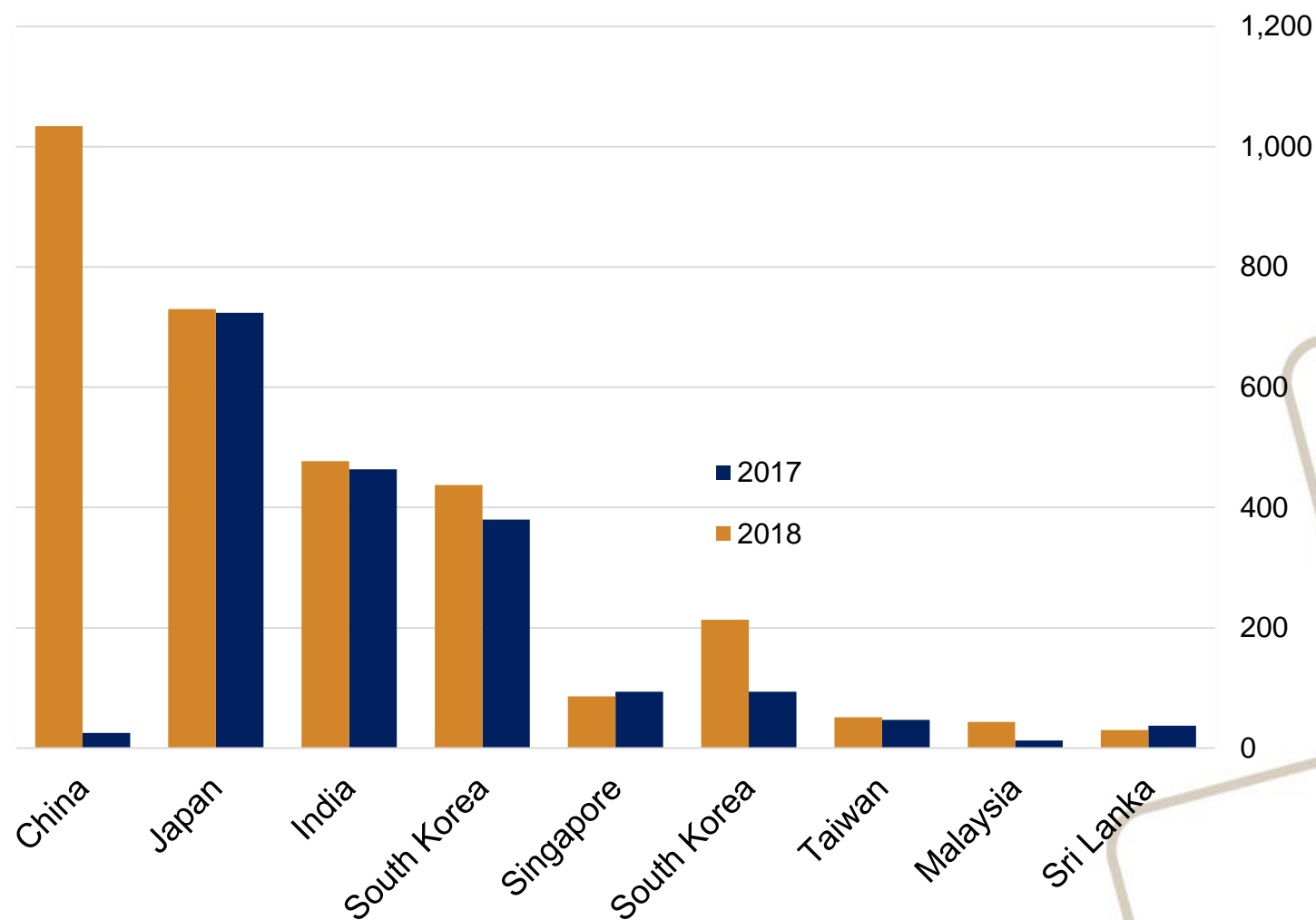
U.S. ethanol exports – 3.0 billion liters, through Feb. 2019


millions of liters



Ethanol imports forecasted to rise and suppliers to change

millions of liters





Prospects for the future of global ethanol use by 2030

- Continued use for GHG reduction targets
- Increased share of exports as a component of total production
- Normalization of ethanol use in countries without production
- Expanded global trade, tariff rates equitable to other energy sources